

TOT280" 50252660

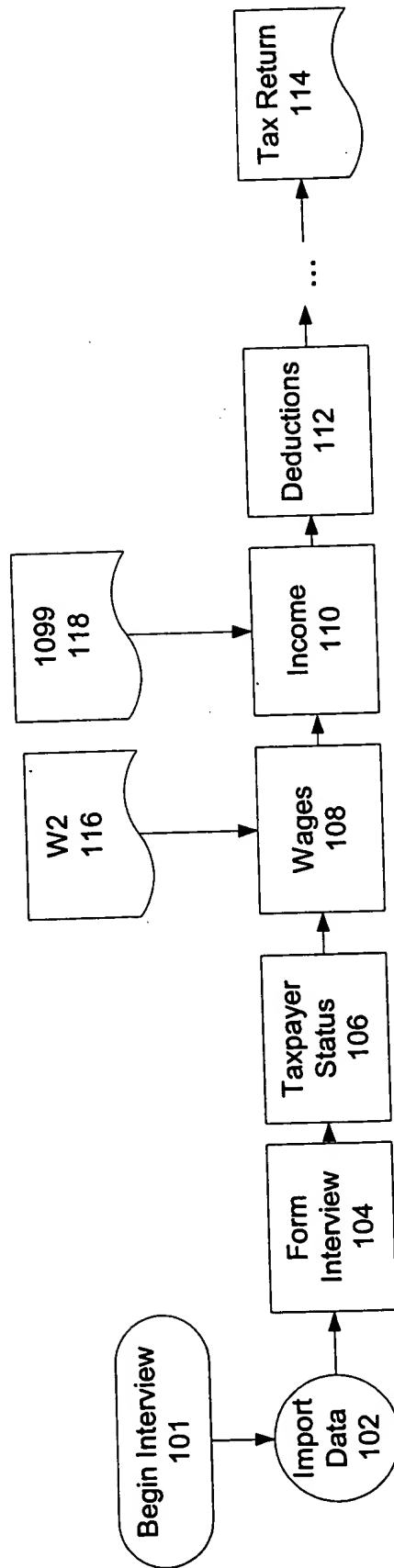


Fig. 1 (Prior Art)

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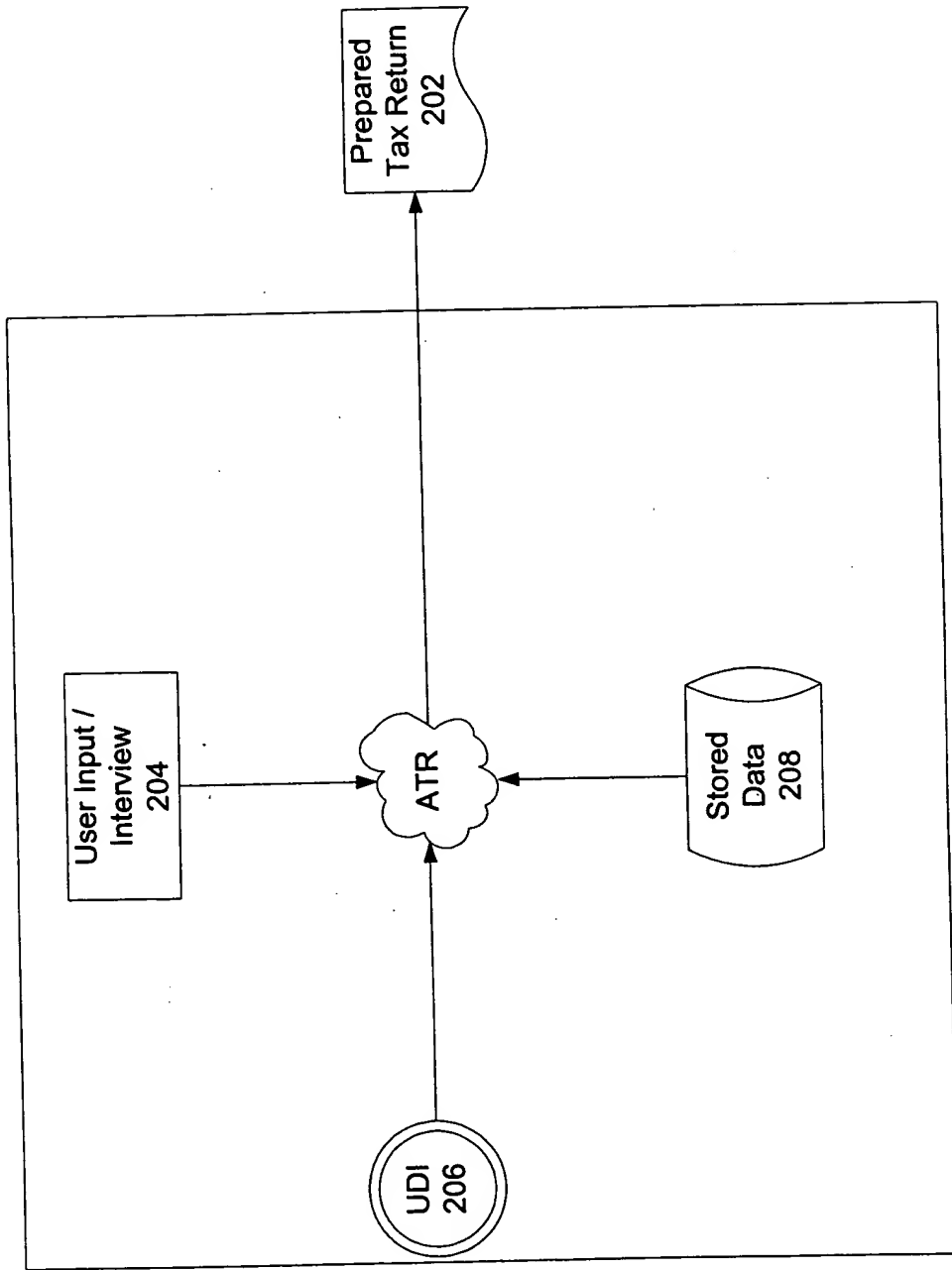


Fig. 2

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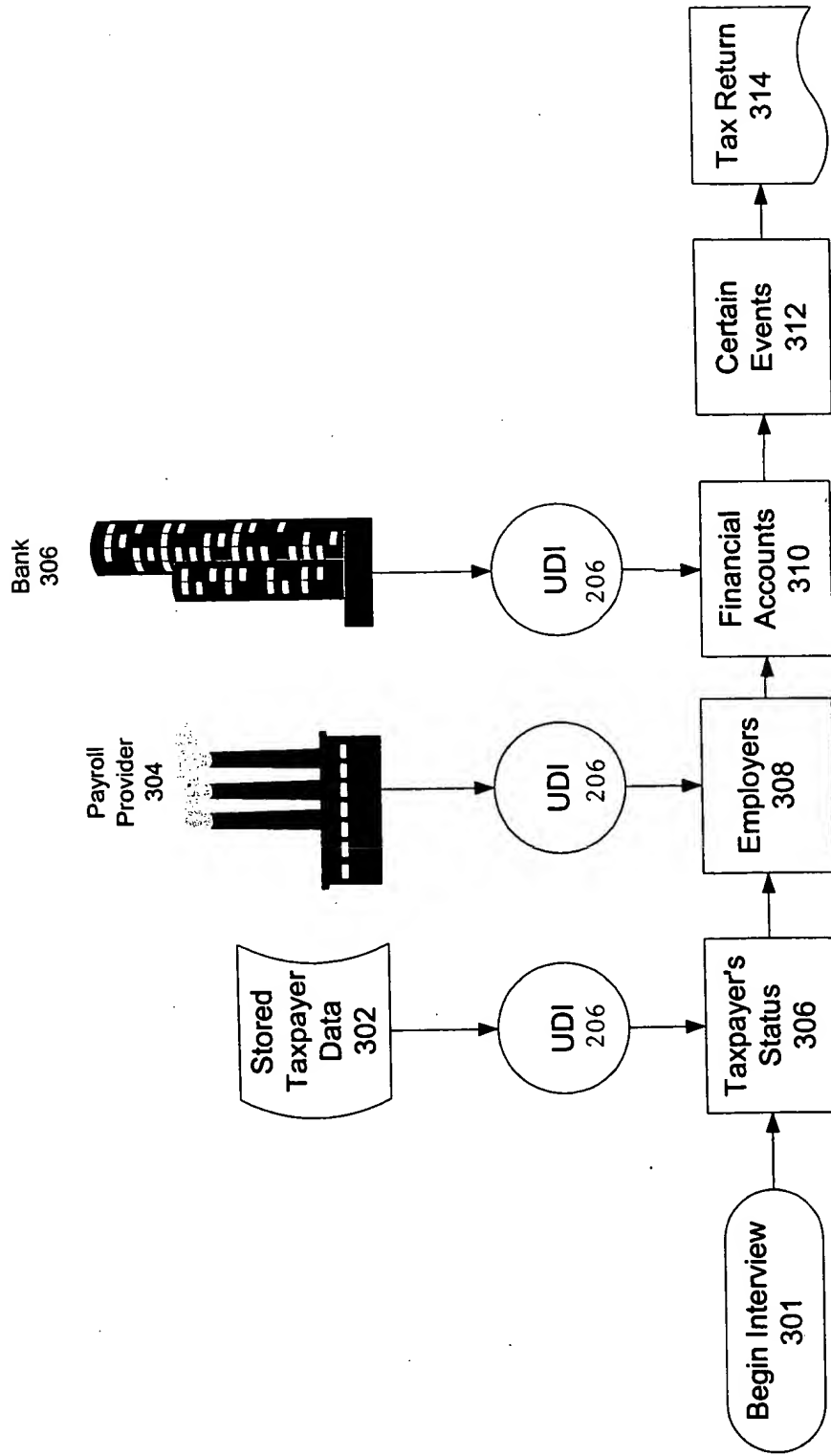


Fig. 3

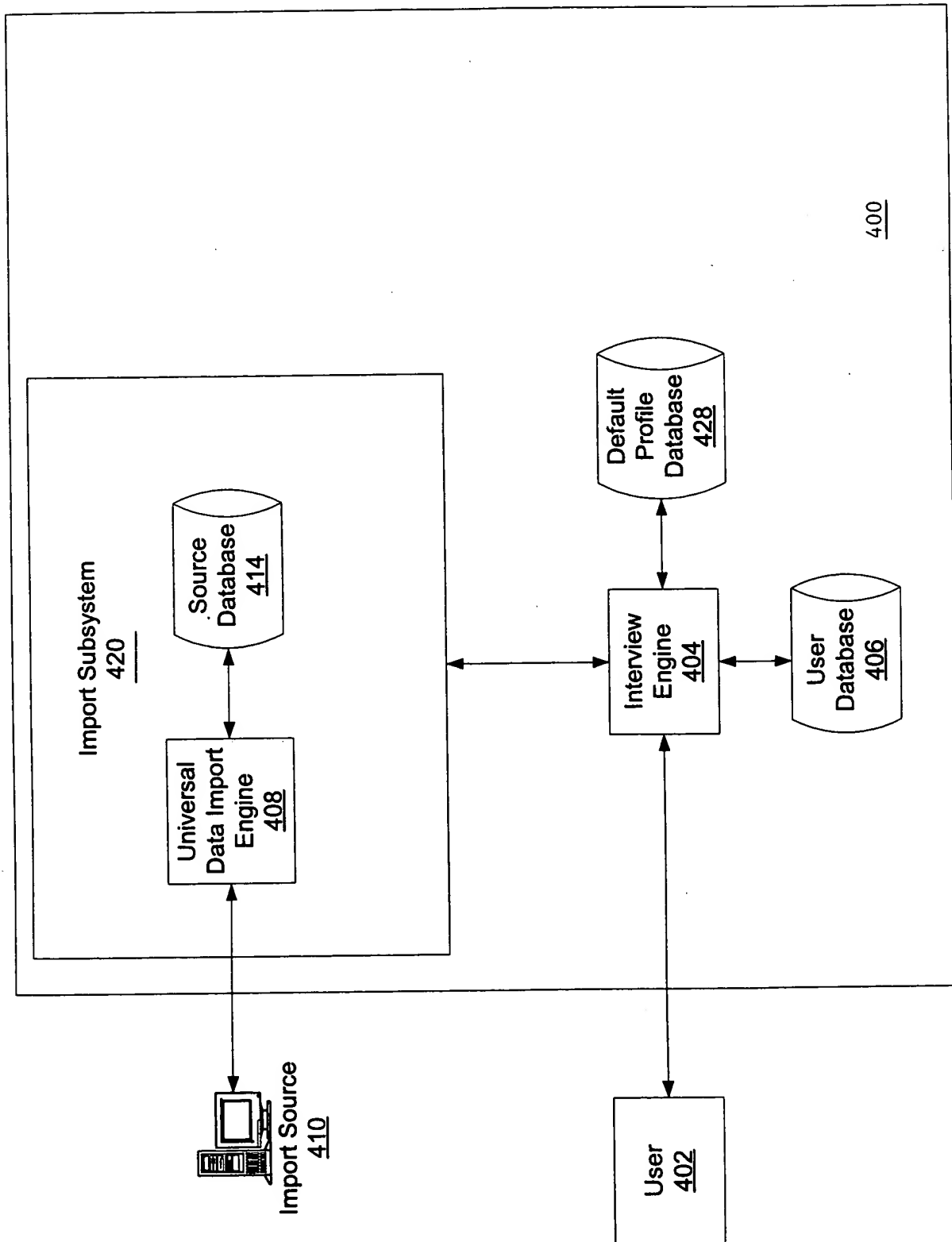


Fig. 4

T01280" 5025E660

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EXPRESS MAIL NO: EL541496336US  
IN RE: NEW APPLICATION  
FILED: August 21, 2001  
TITLE: AUTOMATED TAX RETURN WITH UNIVERSAL  
DATA IMPORT  
Atty Docket No: 16319-05400  
Sheet 5 of 13

EasyStep

1. Personal Info 2. Income 3. Deductions 4. Taxes & Credits 5. Misc

Refund \$0

Help

## Import Form W-2

Instead of typing your information into TurboTax, you might be able to download it directly into TurboTax from your employer. It's more accurate than entering the information manually and it saves you time.

Do you want to determine if you can download your W-2 into TurboTax?

☐ Back

☒ Yes

☐ No

500

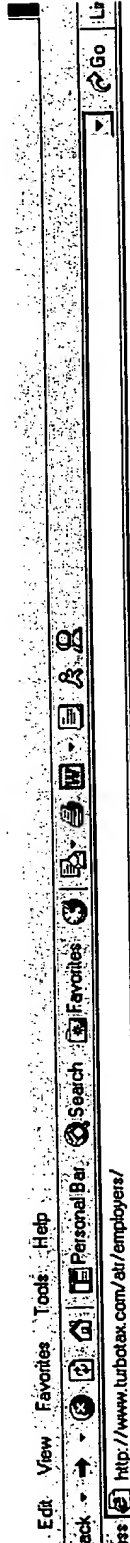
FIG. 5

☐ Show Tax Form

When will the Automated Tax  
Return service be available?

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## Import Your W-2 to TurboTax

You can import your W-2 information to TurboTax if your employer is participating in the Automated Tax Return program. Follow the steps below to find out if your W-2 is available for import.

**Step 1** Find the nine digit Employer Identification Number (EIN) on your W-2. (The EIN is found in box b of your W-2)

**Step 2** Enter your employer's EIN, then click "Go."

Employer EIN:

Go

600

FIG. 6

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TITLE: AUTOMATED TAX RETURN WITH /VERSAL  
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View Form EasyStep Tools Online Window Help

EasyStep

1: Personal Info 2: Income 3: Deductions 4: Expenses 5: Misc

Refund \$0

Help

**W-2 Import from ProBusiness**

**ProBusiness**

Enter your Social Security Number (SSN) and the amount listed in Box 1 of your 2000 Form W-2 to import your W-2 from ProBusiness.  
Note: Enter the Box 1 amount without dollar signs, commas or decimal points. For example, 29,589.90 would be entered below as 2958990.

SSN

123-45-6789 ← 702

Box 1 Amount

← 704

Which username or password should I use?

What if I don't know my username or password?

What if my username or password does not work?

If I have a large amount of information to import, how should I import it?

What if I decide that I don't want to import my return information?

Back

Skip Import

Continue

FIG. 7

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File View Forms EasyStep Tools Options Windows Help

EasyStep

1. Personal Info 2. Income 3. Deductions 4. Taxes/Credits 5. Misc

Refund \$0

Help

## Tax Information from ProBusiness

Select "Import Now" to import the following tax information into your return.

Wages and Tax: Big Airlines	\$37,142.07
-----------------------------	-------------

802

Details

Import Now

Skip Import

Back

Can I see the details of what will import?

What if I only want to import some of this information?

After I import my data, can the information?

What if I decide that I don't want to import this information?

What if I decide that I don't want this information in my return after I import it?

If I have a large number of transactions to import, can TurboTax still import the data?

What if I find an error in my imported data?

What if I import a 1099-INT, 1099-DIV and two worksheets are created?

FIG. 8



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File View Forms EasyStep Tools Online Window Help

EasyStep 1. Personal Info 2. Income 3. Deductions 4. Taxes/Credits 5. Misc

Refund \$0 Help

### Tax Information

Select "Import Now" to i

Wages and Tax: Big Airlines \$37,142.07

Wages and Tax: Big Airlines	
Employer Info:	21-6000928
Employer Federal ID	Big Airlines
Employer name1	P.O. Box 66100
Employer address	Chicago
Employer city	IL
Employer state	60666
Employer postal code	USA
Employer country	
Employee Info:	219-66-6512
Employee SS number	Kathy L. West
Employee name	12823 University Avenue
Employee address	San Diego
Employee city	CA
Employee state	92124
Employee postal code	USA
Employee country	37,142.07
Wages, tips, other compe...	4,203.37
Federal tax withheld	39,124.53
Social security wages	2,425.72
Social security tax withheld	

900 ~

Back

Help

Cancel

Can I see the details of what I will import?

What if I only want to import some of this information?

After I import my data, can the information?

What if I decide that I don't want to import this information?

What if I decide that I don't want this information in my return after I import it?

If I have a large number of transactions to import, can TurboTax still import the data?

What if I find an error in my imported data?

What if I import a 1099-INT, 1099-OLD, and two workbooks are created?

FIG. 9

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IN RE: NEW APPLICATION  
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TITLE: AUTOMATED TAX RETURN WITH UNIV  
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View Forms EasyStep Tools Online Window Help

EasyStep 1. Personal Info 2. Income 3. Deductions 4. Taxes/Credits 5. Misc

Refund \$0

Help

## Form W-2: Wages and Salaries

You have successfully imported the following W-2. Select "Review W-2" to review any of the imported information.

Employee:	Kathy L. West
Employer:	Big Airlines
Wages/Salaries:	\$37,142.07
Federal Taxes Withheld:	\$4,203.37
California Taxes Withheld:	\$796.54

1000

Is this all the information that was imported?

How can I see all the information that was imported for this W-2?

Should I review my W-2?

What should I do if the W-2 information I imported appears to be incorrect?

Back

Review W-2

Continue

FIG. 10

Show Tax Form

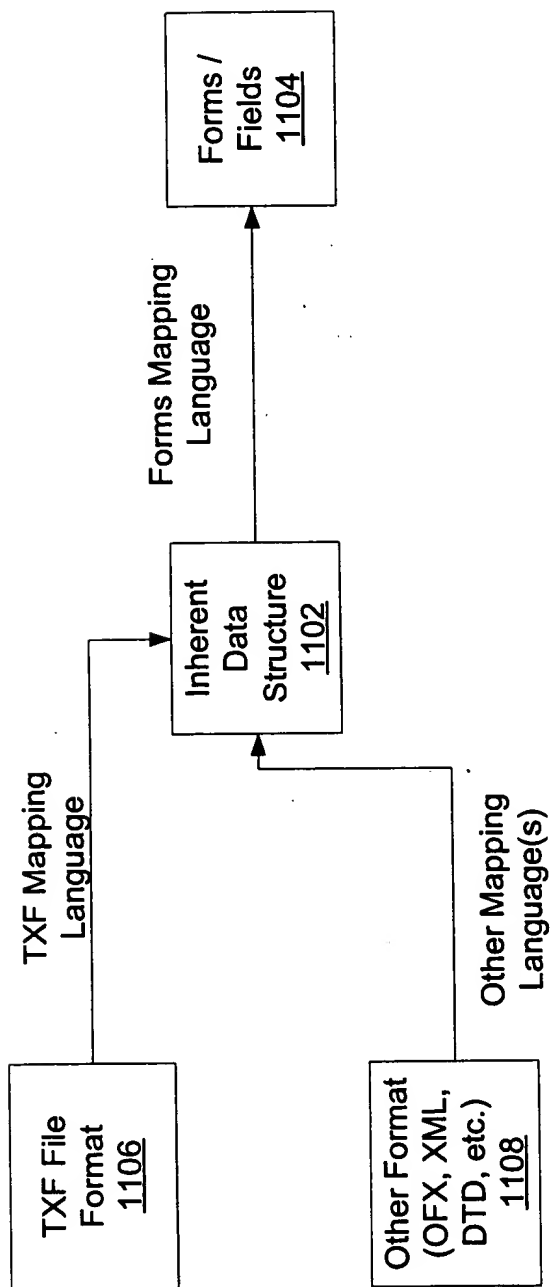
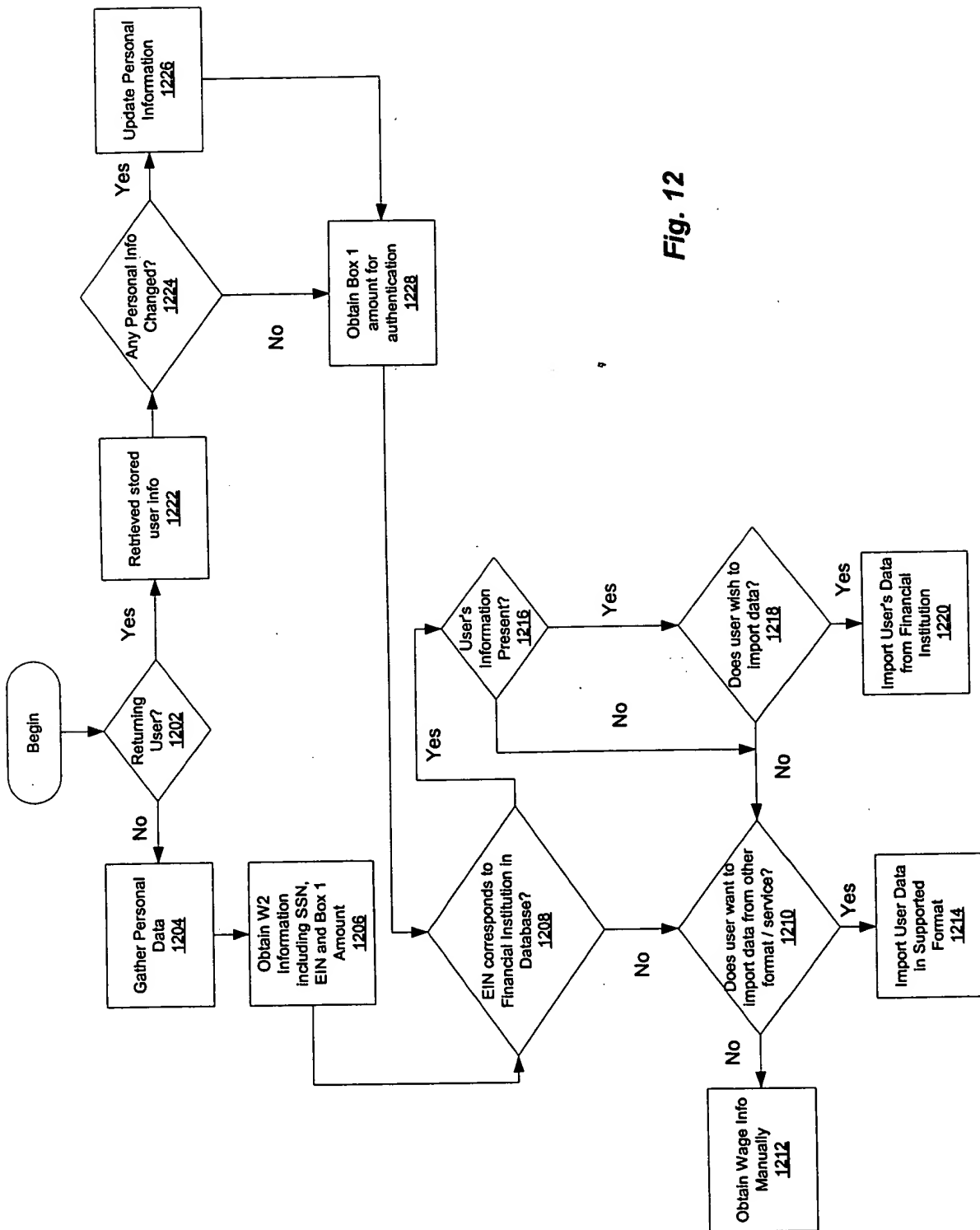


Fig. 11

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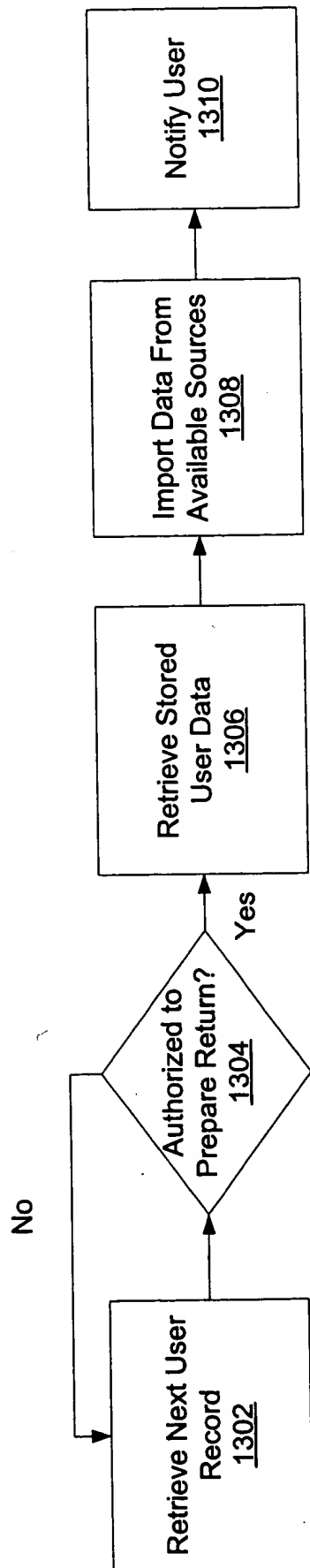


Fig. 13

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